



Snapshots from the Journey

Portfolio Guide for the
Service Coordinator

Module 6





Description of Module 6

Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

First contacts with families can set the tone for future relationships between the family and early intervention system service providers. Families must be given the information, support, and opportunity to fulfill their role as full decision-making partners in the early intervention process. This will be evidenced by professionals who demonstrate cultural sensitivity in their relationship with families, professionals who demonstrate flexibility, acknowledging that families have unique needs, professionals who seek to involve families as key decision makers throughout the early intervention process, and professionals willing to collaborate across agency lines for the benefit of the child and family (Addison, S. and Mattheiss, L., 2004). Putting these ideas into practice starts with the initial contact with the family.

This training module is comprised of three parts: (1) Gathering Information, (2) Intake & Referral, and (3) Building Resources. Basic adult learning principles are included in an effort to help service coordinators present information to families in ways that will enhance their understanding. Through pre- and post-tests, case examples, role-playing, and other activities, the participant(s) will learn how to gather information in ways that are comfortable and appropriate for families.

Landmarks of the early intervention process are included so service coordinators will be able to accurately inform families of how the system operates. Participants will practice explaining the early intervention system to families using an intake tool and will review forms related to intake and referral.

Participants will complete several outside assignments for this module. An intake field observation will be done, and visits to several key service providers will be completed in order to help the service coordinator learn more about resources available to children and families. Participants will complete an internet research assignment in order to familiarize themselves with prominent state and federal resources as well.



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Competencies

- Has knowledge and understanding of principles of adult learning that affect family members as they receive information about the early intervention system.
- Takes into account and respects the various commitments of family members in planning intervention.
- Has the ability to initiate and maintain effective and systematic consultation (communication) with family members and caregivers in a sensitive manner.
- Has knowledge and understanding of how to disseminate information concerning the options for intervention, including financial assistance, to families and other professionals in the community.
- Consults with and refers to other professionals and community agencies.
- Facilitates the movement of all appropriate clients into the intake and screening process.
- Disseminates information throughout the community regarding the availability of services, criteria for eligibility, and methods of referral.
- Demonstrates skill in identifying gaps and overlaps in services provided to children and their families.
- Is willing to act as a representative of TEIS at a variety of community and regional events that include child find and public awareness activities.
- Participates in, conducts, and implements screening and child find programs.
- Exercises procedural safeguards as described in Part C of IDEA.
- Coordinates services to assure that all evaluations and provision of services are performed in a timely manner.
- Demonstrates knowledge and skill in conducting family-directed assessments to determine resources, priorities and concerns of the family and identification of the supports and services necessary to enhance the family's capacity to meet the developmental needs of their infant or toddler.
- Is familiar with resources in the area, and has the ability to assist families in the utilization of community, state, and federal resources to advocate for new or needed services.



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Module 6

Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

Assignments/Activity	Measure of Achievement
<p>Module Description</p> <p>Note that the contents of this module are divided into three components: (1) Gathering Information, (2) Intake & Referral, and (3) Building Resources.</p>	
<p>6.1 Gathering Information PowerPoint</p> <p>View PowerPoint <i>Gathering Information</i> (slides 1-13), engaging in discussion as directed.</p>	<p>Active participation in discussion and activities during PowerPoint as lead by the trainer.</p>
<p>6.2 Routines-Based Interview</p> <p>Please read</p> <p>The routines-based interview is a powerful component in the process of intervention planning. If your district/agency chooses to incorporate this model into practice, the trainer will complete the three activities presented here during formal training with the learner(s). Since this will add significant additional time necessary to complete this module, the trainer may choose to complete these activities at a separate training</p>	<p>Independent outside assignment.</p> <p>Review of materials as requested and placement in portfolio.</p>

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<p>date and time. The trainer is further cautioned that there are associated practices tied to the routines-based interview, such as the Eco-map, which are not included in this brief activity. To ensure full understanding of this model, please consider the following:</p> <p>Training and technical assistance For keynote presentations, conference sessions, workshops, or site-specific technical assistance, contact Robin McWilliam: Robin.McWilliam@Vanderbilt.edu In addition to Dr. McWilliam, an international network of colleagues, former students and staff, trainers, faculty, and program directors that have experience with Dr. McWilliam's model are available.</p> <p>Service coordinators benefit from learning about the routines-based interview. All participants should complete the following activities independently outside of formal training time for this module if they are not included in formal training as described above.</p> <p>Step 1 Review the content from the article, <i>Functional Intervention Planning: The Routines-Based Interview</i> (6.2a).</p> <p>Step 2 View the video to observe Dr.</p>	

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<p>Robin McWilliam as he demonstrates this activity. Video — <i>Routines-Based Interview (RBI)</i> 45-minute video example of an interview for developing an IFSP with a family (\$20.00).</p> <p>There are two ways to order materials:</p> <ol style="list-style-type: none"> 1. Print the page from the website below, check materials desired, and fax the page to Sheila Allison, Assistant to the Director (615-936-0256). 2. E-mail Sheila.Allison@Vanderbilt.edu, listing the materials desired. You may list them by product number. 3. Visit the following website for a complete listing of Dr. McWilliam's materials: http://www.vanderbiltchildrens.com/interior.php?mid=983 <p>Step 3 Review 6.2b <i>Routines-Based Interview Form</i>. Place the above article and form in the portfolio guide after review. If this step is completed during formal training, role-play with the participant a brief interview, using the interview form for recording information, and place in portfolio.</p>	

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<p>6.3 Gathering Information Pre-Quiz</p> <p>Complete the pre-quiz. Give to trainer upon completion.</p>	Pre-quiz completion
<p>6.4 Case example — Jack</p> <p>View PowerPoint <i>Gathering Information</i> (slides 14-16).</p> <p>Develop a list of questions that might be used during the conversation with Susan and Gayle at the initial meeting.</p> <p>Record your questions on worksheet 6.4a, and place in portfolio upon completion.</p> <p>View slides 17-24. Participate as directed by the trainer.</p>	<p>Active participation in discussion and activities during PowerPoint as lead by the trainer.</p> <p>Satisfactory listing of interview questions on worksheet 6.4, as determined by the trainer. Worksheet placed in portfolio.</p>
<p>6.5 Ask Mrs. Yonkers</p> <p>View PowerPoint <i>Gathering Information</i> (slides 25-28), reading the questions posed. Indicate whether you feel the question is important to ask Mrs. Yonkers.</p> <p>After the participant(s) make their decision, go to slides 29-38 to find out what Mrs. Yonkers thinks.</p>	Active participation and completion of activity as directed by the trainer.
<p>6.6 Gathering Information Post-Quiz</p> <p>Complete the post-quiz. Compare your results to your own pre-quiz, and file both in the portfolio.</p>	Improved score on post-quiz, compared to score on pre-quiz
<p>6.7 Intake & Referral Pre-Test</p> <p>Complete the pre-test.</p>	Completion of pre-test.
<p>6.8 Intake & Referral</p> <p>View PowerPoint <i>Intake and</i></p>	Active participation in brief discussion as directed by the trainer.

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<i>Referral</i> (slides 1-17), engaging in brief discussion as advised.	
<p>6.9 Tennessee's Early Intervention System</p> <p>Using the <i>Tennessee's Early Intervention</i> flipchart, work in pairs as instructed. One person will play the role of the family member and the other person will play the role of the service coordinator. Practice presenting the information as you would to a family. Switch roles if time allows.</p>	Active participation in activity to the satisfaction of the trainer.
<p>6.10 Intake Checklists</p> <p>Read the three checklists outside of training. Follow-up with the trainer or appropriate person in your office with any questions about these procedures.</p> <p>Place these checklists in a notebook to be used as a quick reference as long as needed.</p>	<p>Follow-up with trainer or other appropriate person in the office for resolution of any questions.</p> <p>Verification by trainer of notebook containing checklists 6.10a, 6.10b, and 6.10c.</p>
<p>6.11 Form Review</p> <p>Participate as directed in review of forms related to intake and referral.</p>	Active participation as directed by the trainer.
<p>6.12 Intake Field Observation</p> <p>Arrange an appointment to accompany an experienced service coordinator on intake visit. Complete the observation form (6.12) following the visit. Share the results with the trainer for discussion and feedback, and place the form in the portfolio.</p>	Satisfaction of the trainer based on follow-up discussion using observation form.
<p>6.13 TEIS Overview</p> <p>If recommended by the trainer,</p>	Awareness of optional child find and public awareness tool

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review PowerPoint <i>TEIS Overview</i> outside of training. See note pages of PowerPoint for suggested dialogue.	
<p>6.14 More Rules for the Road Intake & Referral Post-Test</p> <p>Complete the post-test. Compare your performance with your results on the pre-test.</p>	Improvement in number of correct responses based on pre- and post-test results to the satisfaction of the trainer.
<p>6.15 Building Resources</p> <p>View PowerPoint <i>Building Resources</i> (slides 1-5), engaging in brief discussion as directed.</p>	Active participation in brief discussion as directed by the trainer.
<p>6.16 Building Resources Web Assignment</p> <p>It is essential that service coordinators know how to access information and resources of use to families. This assignment will take time to do the appropriate research, and should be done outside of formal training time.</p> <p>Please complete these steps:</p> <ol style="list-style-type: none"> 1. Visit the websites found on assignment sheet <i>Building Resources Assignment</i> 6.16a and familiarize yourself with these state and federal programs. 2. Build a resource guide that you can refer to in your work. List each program, including the name, address, web address, phone number, contact person, and a very brief program summary or description. Your <i>TEIS Directory of Services</i> may be useful in gathering local contact information, where 	Satisfactory completion of research and development of research guide to be included in the portfolio. Copy should be available for use by the participant in their work.

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<p>appropriate.</p> <ol style="list-style-type: none"> Place your information in a folder/notebook (or on index cards in a file box), and give to your trainer/supervisor for their approval. Place a copy of this information in your portfolio. (If you choose to keep this information on index cards, a written statement of satisfactory completion of this activity can be placed in your portfolio by your trainer/supervisor.) 	
<p>6.17 Building Resources in Everyday Routines, Settings, and Activities</p> <p>Using worksheet 6.17, identify ten specific typical settings in your local area that serve to promote the development and success of infants and toddlers. If you are new to the area, you might need to talk to other service coordinators or families in order to learn what is available in the counties you serve. If you are serving multiple counties, try to include examples from each county. Upon completion, share this with your trainer/supervisor, and place a copy in your portfolio.</p>	<p>Complete list of ten specific settings that are appropriate for promoting the development of infants and toddlers, county-specific if appropriate.</p>
<p>6.18 Building Local Resources Brochures & Observations</p> <ol style="list-style-type: none"> Review <i>TEIS Directory of Services</i>. Carefully read brochures provided by the trainer to familiarize yourself with local area service providers. 	<p>Completion of assigned review of directory and brochures.</p> <p>Completion of assigned observations and forms. Follow-up discussion with the trainer completed as directed.</p>

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<p>3. Arrange to meet with and/or observe 3-5 key providers of services to children and families in your area completing <i>Service Provider Information – Observation Form(s)</i> (6.18a) as directed.</p> <p>The trainer/supervisor will provide contact information to facilitate scheduling these observations. Afterwards, schedule a time to discuss your observations with the trainer/supervisor or their designee (other experienced service coordinator).</p> <p>Obviously, families would need to be informed and give their consent as appropriate.</p>	